

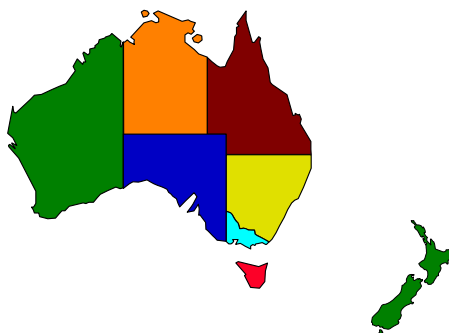


August 2002

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The data provided in this bulletin is given solely as an information resource for U.S. companies and does not imply endorsement by the U.S. Dept. of Commerce.



Export Opportunities Bulletin

U.S. Commercial Service Australia/New Zealand



Sector in Focus: Construction/Housing

There has been much activity lately in the Australian construction/housing industry... For further information on this industry sector, please contact Patricia Matt at: patricia.matt@mail.doc.gov.

Here are some of Trish's highlights...

Multi-Unit Approvals Surge Ahead...

A surge in multi-unit building activity in New South Wales, South Australia, and Western Australia has resulted in another solid increase in dwelling approvals for Australia. Figures for April 2002, released on June 3, 2002, by the Australian Bureau of Statistics, showed that a 17.4 percent rise in multi-unit approvals to 5,489 more than offset a 0.2 percent fall to 9,460 in the detached house market, and put total dwelling approvals at their highest level since February 2000.

... As New Home Sales Remain Strong

On May 30, 2002, the Housing Industry Association of Association released the results of a monthly *New Home Sales Survey* conducted among the largest 100 residential builders in Australia. The survey showed that an estimated 12,337 new houses and multi-units were sold during the month of April 2002, an increase of nine percent on March 2002. Sales made in the three months to April 2002, at 35,090, were 17 percent higher than for the previous quarter.

Cont. P2

Housing Remains a Strong Contributor to Growth

According to the Housing Industry Association (HIA), despite a fall in the number of new homes which began in the March 2002 quarter, Australia's housing industry continues to be a key driver in the nation's growth. The *HIA National Outlook* report shows that in spite of the strong demand for housing, Australia's home builders and materials manufacturers have kept prices low, with new home prices rising only 2.4 percent over the year. The outlook for the industry is for a further slow down in housing starts. The bright spot however, is that the home renovation market continues to go from strength to strength with an estimated A\$14.4 billion (US\$7.8billion) worth of work done this financial year.

"Evergen" For Recyclable Buildings

Australian scientists have launched a new project, Evergen, to galvanize Australia's property, building and construction industry to embrace sustainability. Evergen has been touted as an idea with a tangible outcome – commercial buildings, which are built faster, perform better, sell for more, and which ultimately are recyclable and have a zero net cost to the environment. Evergen is an initiative by the Commonwealth Scientific and Industrial Research Organization (CSIRO) in partnership with the Australian Government Department of Industry, Tourism and Resources through the Innovation Access Program. For more information on the Evergen project please contact:

Greg.Foliente@csiro.au

Looking at Making Concrete With Glass

Australian scientists have given the green light to using waste glass in concrete construction. This means that local councils, recyclers, municipal engineers, and private contractors can look at using glass concrete for a range of construction applications including footpaths, kerbs, gutters, and similar work. The research program was prepared by the Commonwealth Scientific and Industrial Research Organization (CSIRO) for EcoRecycle Victoria, ACI Glass Packaging, and Alex Fraser Recycling Industries. Further information on this research program is available from: Mr. Robert Peile, Business Development Manager, CSIRO Sustainable Materials Engineering at: Robert.Peile@csiro.au

ACCESS AUSTRALIA

Railroad Equipment and Services

**IS THERE A MARKET FOR YOUR
PRODUCTS IN AUSTRALIA? LET US
"ACCESS" IT FOR YOU!**



Through our unique program called Access Australia, we offer U.S. companies an inexpensive way of testing the Australian market and making initial contacts.

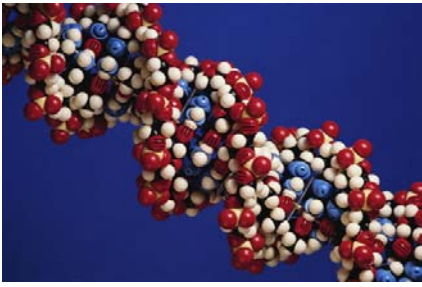
The Australian market for railroad equipment is conservatively valued at \$300 million. The industry itself is currently being characterized by reform, privatization and outsourcing. The changes taking place within the industry are expected to increase the demand for railroad equipment and services.

How does the Access Australia Program Work?

After you indicate interest, our office in Sydney, Australia will prepare a mailing list of potential agents, distributors, wholesalers, joint venture partners and end-users associated with the railroad industry. A directory containing a brief profile of your company together with profiles of other U.S. participants is then sent to these contacts alerting them of the type of business you are seeking and offering them further product/ service information. Australian companies that respond to the mailing will be forwarded your catalogs. You will then be provided with a list of any firms which expressed an initial interest in your products/services.

The fee to participate in this program is US\$150.

For further information on how you can participate in the program, please contact John Kanawati, U.S. Commercial Service, on tel: 61-2-9373 9207, Fax: 61-2-9221 0573 or email: john.kanawati@mail.doc.gov



Victoria's Stem Cell Research Sector – An Update

The State of Victoria's stem cell research sector is set for further expansion with the Victorian Government announcing a grant of up to US\$135,000 for the establishment of a stem cell production facility in Melbourne.

Melbourne-based company ES Cell International will use the facility to meet world research demands for human embryonic stem cells. ES Cell recently announced that it will supply embryonic stem cells to the U.S. National Institutes of Health (NIH). Press reports indicate that this is NIH's first international agreement involving the distribution of human stem cell lines.

Under a Memorandum of Understanding, scientists at NIH and scientists at nonprofit institutions that receive grants from the NIH will have access to ES Cell's six existing stem cell lines to explore new areas of research.

Vitamin, Mineral and Supplements (VMS) - An Update

Top performing segments in the vitamin, mineral and supplement (VMS) category in Australia include supplements for weight loss, stress, energy, libido, arthritis, bones, teeth, and pregnancy. The VMS industry in Australia is worth approximately US\$145 million. According to industry sources, the value of the market is increasing by approximately 10 percent per year. In volume terms, however, the market remains steady.

In terms of market share, the leading supplier of VMS products include: Natures' Own (18.1%); Blackmores (13.3%); Natural Nutrition (7.8%) and Bio-Organics (7.2%).

DID YOU KNOW?

...that Australia's gross domestic product is forecasted to grow by 3.8 percent in 2003, the **highest** of all countries, included in an "Economist" survey of 15 countries and Europe.

The top performing product lines and ingredients include: glucosamine sulphate, fish oil, multi vitamins, calcium and acidophilus.

The weight loss/slimming category

has experienced strong growth as a result of aggressive marketing to support new product releases. Pharmacists are selling an increasing amount of weight loss and libido-enhancing preparations because they generate substantial profit on these products. Additionally, an increased understanding of the effect of changing Australian lifestyles and eating habits is expected to fuel new interest in the children's vitamin market. The largest range of children's vitamins available in Australia are supplied by a local firm, Herron Pharmaceuticals.

Many pharmacies in Australia are now employing naturopaths to handle the increasing public appetite for complementary medicines. VMS manufacturers are racing to keep up with the tailoring new products to meet the increasing demand which has been, in part, stimulated by aggressive marketing of VMS products that are tailored to meet specific lifestyle problems.

Libido, energy, and well-being are issues that both male and female Australians are concerned about. The so-called "lifestyle" VMS products are largely driven by advertising and marketing. However, the promotion of these products is increasing the awareness of how Australians can benefit from other VMS products which, in turn, spurs overall VMS market demand.

For further information on the Biotechnology, Drugs/Pharmaceuticals and Complementary Healthcare industries in Australia contact:

Monique.Roos@mail.doc.gov

IT Snippets

DID YOU KNOW?

According to a recent survey of Australian companies by Deloitte Touche Tohmatsu...



- Computer crime in Australia has doubled in three years and now exceeds the U.S.
- Of the top 300 Australian companies, 67 percent have been hit by criminal activity over the last 12 months.
- Of the surveyed group, 98 percent experienced some sort of computer abuse, from PC theft to network sabotage.
- 89 percent of organizations suffering a security incident were attacked from the outside – 65 percent were attacked internally.
- 70 percent of Australian companies have increased expenditure on information security over the last 12 months in response to incidents.
- 91 percent of these companies have physical security, 100 percent have password protection, 96 percent have access controls, 96 percent have installed firewalls, and 99 percent have virus protection software.
- 48 percent of companies have implemented encryption technologies, while 46 percent have put in place digital IDs.
- Only 4 percent of companies have implemented biometric authentication.

For further information on the IT industry in Australia, or to be added to the mailing list for the *Australian IT Bulletin* contact: duncan.archibald@mail.doc.gov

BuyUSA Web-link program

www.buyusa.gov/australia

The BuyUSA weblink program features links to local service companies to better assist your clients develop their products in the Australian market. Service companies featured include:

- Legal firms, accountants,
- Freight forwarders,
- Tradeshow organizers
- Industry consultants.

All firms are known to the U.S. Commercial Service in Australia.

Do take a look - they are here to help YOU!

ACCESS AUSTRALIA & NEW ZEALAND

Herbal, Medicinal, Vitamin & Supplement Products

Australia and New Zealand are very receptive markets for American products. We will be conducting a program specifically U.S. companies that supply Herbal, Medicinal, Vitamin and Supplement Products and would like to explore the market opportunities for their products in Australia and New Zealand.

Our Access program is designed to offer you both an effective and inexpensive means for testing market potential and making initial contact with potential Australian and New Zealand business partners. Once you decide to participate, potential agents & distributors specific to your product(s) will be contacted. You will obtain a list of those Australian and New Zealand companies that have expressed interest in receiving further information on your company's products.



The fee to participate in the program is US\$200.

For further information on how you can participate in the program please contact Monique Roos, U.S. Commercial Service, Tel: 61-2-9373 9210

Fax: 61-2-9221 0573 or
email: Monique.Roos@mail.doc.gov



The Kiwi Connection



Excellent opportunities in NEW ZEALAND...

SKI EQUIPMENT

Coronet Peak and The Remarkables, located near Queenstown in New Zealand's South Island, are regarded as two of New Zealand's most important ski fields. In May 2002 these two ski fields and a third South Island ski field, Mt. Hutt, near Christchurch, were sold to a local joint venture company called Southern Alpine Resort Recreation (a joint venture company between Australasian Alpine Ltd., Tourism Milford Ltd and Trojan Holdings Ltd.).

The new managers plan to invest and upgrade existing equipment and are already in contact with the major U.S. suppliers of ski equipment for snow making equipment and chair-lift equipment. The company recognizes opportunities for other U.S. businesses supplying ski equipment specifically: snow mobiles, snowboards and ski racing gear.

U.S. companies specializing in ski equipment are encouraged to contact:

Mr. Duncan Smith
General Manager
nzski.com
PO Box 359
Queenstown
New Zealand
Email: duncan@nzski.com

OIL REFINERY EXPANSION PLANS

New Zealand's only oil refining company, The New Zealand Refining Company (owned by the major NZ oil companies: BP, Caltex, Mobil and Shell; and private investors), is planning to invest in new refinery equipment in order to meet new fuel specifications. Requirements to lower sulphur in diesel and lower benzene in petrol will require new plant and equipment. Although the refinery currently has a small diesel hydrodesulphurisation unit to remove sulphur from diesel, it does not have a catalytic distillation unit to lower benzene in petrol. Both units are required by January 1, 2006. A project team has been established to review technology and consider multinational contractors. U.S. companies specializing in refinery

equipment including pressure vessels, compressors as well as companies with construction capabilities are invited to contact:

Mr. John Pitman
Project Manager
New Zealand Refinery Company
Private Bag 9024
Marsden Point Road, Ruakaka
Whangarei
New Zealand
Ph: 64 (9) 432-8311
Fax: 64 (9) 432-8035
Email: John.Pitman@nzrc.co.nz

NEW HOSPITAL PLANNED FOR WELLINGTON

In early May 2002, the NZ Government announced it will fund a major regional redevelopment of hospital facilities. The redevelopment program includes construction of a new regional hospital in Wellington, a major redevelopment Kenepuru Hospital, and the building of a new "one-stop shop" health center at Kapiti. The new multi-million dollar regional hospital is by far the largest part of the redevelopment plan and is the largest construction project currently scheduled in Wellington. To streamline inquiries, the project managers at the Capital & Coast District Health Board invite U.S. companies to regularly view their website for tender information. The Board's website is: www.ccdhb.org.nz

Contact New Zealand

For a copy of the complete report, or for further information on opportunities in NZ...

auckland.office.box@mail.doc.gov or fax: 64 (9) 303-3156
wellington.office.box@mail.doc.gov or fax: 64 (4) 473-0770

THE AUSTRALIAN FEDERAL BUDGET MAY 14, 2002

KEY AREAS OF OPPORTUNITIES...

Spending on the Environment

The Commonwealth Government will spend over US\$950 million to protect Australia's environment next financial year, US\$100 million more than in 2001-02.

The Natural Heritage Trust is being extended for the next five years with a US\$500 million injection. A key focus of the next phase of the Natural Heritage Trust will be water quality. For example, Rivercare projects will support improved land and water practices that affect the health of rivers. Coastcare and Rivercare funding will also target coastal and urban water quality hot spots.



The marine environment will also benefit significantly from the Budget's allocation of funds to coastal and offshore surveillance and response. Extra aerial and marine surveillance will include an increased capacity to detect and report significant abundance or mortality of wild life, oil pollution and other environmental damage. The Government will also continue to pursue a permanent global ban on commercial whaling and seek to establish a sanctuary for whales in the South Pacific.

The environmental initiatives in the 2002-03 Budget include:

- the development of a marine plan for the Gulf of Carpentaria and the Torres Strait region
- rehabilitate and return historic Sydney Harbor Foreshore lands to the public
- in-service emissions testing of diesel and petrol vehicles and to implement the new national fuel quality standards legislation
- to promote eco-efficiency and which reduces the use of resources and cuts pollution, waste and production costs, and to improve the environmental performance of the packaging, construction and mining industries
- the development of sewerage schemes for Boat Harbor and Sisters Beach, Tasmania
- improved protection for the Great Barrier Reef.

U.S. companies interested in the Australian environmental market are encouraged to contact: john.kanawati@mail.doc.gov

Defense Budget 2002

The Australian Department of Defense funding base for 2002-03 and beyond is based primarily on the Government's implementation of a White Paper released in December 2000. In the Budget, total funding resource available to the Defense Department in FY 2002-03 (July-June) is US\$12.16 million, representing a five-percent increase of US\$606,420

compared to the estimated result for 2001-02.

New strategic priorities include the conduct of operations to protect Australia's northern and western borders from unauthorized arrivals and to contribute to the international coalition fighting terrorism, as well as the enhancement of domestic counter terrorism capabilities (including a response to chemical, biological, radiological, nuclear and explosive incidents).

Capital Budget: the Department of Defense plans to spend US\$2.2 billion in 2002-03 to purchase specialist military equipment, property, plant and other capital equipment.



The Commercial Service will continue to seek out individual opportunities for U.S. companies arising out of the implementation of measures proposed in the 2002 Budget. For further information projects and further phases of existing projects, contact Industry Specialist, Phil Keeling at phil.keeling@mail.doc.gov

Extra Security Funding in 2002 Budget

Domestic security is a central theme of Australia's 2002 Federal Budget. In total, the Budget allocates an additional US\$700 million over five years to upgrade security within Australia. The main agencies to benefit from an increase in government funding are the Australian Federal Police (AFP), the Australian Security Intelligence Organization (ASIO), the Australian Secret Intelligence Service (ASIS) and the Office of National Assessments (ONA). Australian Customs is due to receive US\$95 million for extra surveillance flights, X-ray equipment and communications equipment.

For increased border protection, the Justice and Attorney-General portfolios will receive an extra US\$340 million over a four-year period in addition to funding provided to the army for increased anti-terrorism activities.



The Australian Government is also investing in the development of leading-edge technology with the potential to significantly improve passport verification processes. If successfully developed, a biometric identifier will record individual features on a magnetic strip on passports to provide distinctive matching for that individual at airports and other points of entry. This innovation will be funded by an increase in passport fees.

For more information on the security sector in Australia, U.S. firms should direct their inquiries to Phil Keeling, Industry Specialist at phil.keeling@mail.doc.gov

A SNAPSHOT OF AUSTRALIA: AUSTRALIAN 2001 CENSUS DATA RELEASED

The 2001 Census of Population and Housing provides a snapshot of the changing Australian community. On August 7, 2001, when the census was taken, the Australian population was estimated to be just short of 19.5 million people. The Australian population overall is aging with the median age at 35, equal to the U.S. Women are delaying the decision to marry and have children, causing a fall in the household size. Australia's immigration intake has not been large enough to counteract the declining birthrate, due in part to a change in immigration policy since the last census in 1996 that emphasizes skilled migrants rather than general population growth or family reunification. Australians, particularly women, are now more educated and Australians are among the most heavy users of computers and the Internet in the world. There has been a large increase in the reported numbers of aboriginal people resulting in part from more people identifying themselves as indigenous.

2001 Census of Housing and Population: On June 17, 2002 the Australian Bureau of Statistics released the preliminary findings of the 2001 Census of Population and Housing, which was held on August 7, 2001. The Bureau has undertaken a census every five years since 1961.

Australia's Aging Population

The actual number of Australians counted on census night, August 7, 2001, was 18,972,350. The Australian Bureau of Statistics used this figure to derive an estimated population figure of 19,485,278 taking into account such factors as the estimated number of Australian residents temporarily overseas on census night, and the estimated census shortfall resulting from those who were present in Australia but did not complete, or inaccurately completed, the census form. This census figure is 6.75 per cent of the US population (US Census 2000) or a little less than the population of New York State in a country approximately the geographic size of the mainland United States. The population grew 6 per cent in the last 5 years, since the last Australian Census in 1996. All States except for Tasmania (whose population declined) recorded population growth. The State of Queensland recorded the largest

population growth in the last 5 years, increasing by 8.5 per cent. More than three-quarters of the Australian population live on the Australian East Coast. The Australian Capital Territory (covering 911 square miles) is the most densely populated with 332.5 people per square mile and the Northern Territory (covering 520,911 square miles) is the sparsest with 0.4 person per square mile.

The median age of the population was 35 years of age, up 1 year since 1996. This puts Australia on a par with the U.S. and 6 years younger than Japan. The elderly represent a larger proportion of the population than five years ago, while the number of children is declining. The proportion of people age 65 years and older is now 12.6 per cent, up half a percent from 1996. The percentage of Australians in this age group is larger than in the U.S. (11.4 per cent in 2000), but significantly smaller than Japan, where 17.3 per cent, of the population is over 65. The number of children 14 years of age or younger represents 20.7 per cent of the population, down from 21.5 per cent, and lower than the U.S. (21.4 per cent.) The proportion of the population aged 15 years or younger in Japan was 14.6 per cent in 2000.

More People Live Alone And Choosing A Smaller Family:

The combination of a lower fertility rate and higher life expectancy has reduced the average household size to 2.6 persons, down 0.1 percentage point from 1996 and now equal to that in the U.S. The number of women in Australia aged 30 to 34 years who had never married was 211,000, up from 159,848 in 1996. Family households made up 68.8 per cent of all households counted, down from 70.6 per cent in 1996, while single households rose to 22.9 per cent. This compares to 68.1 per cent of family households and 25.8 per cent of single households in the U.S.

Australians and U.S. residents share the goal of home ownership, with 66.2 per cent of all households in both countries either purchasing or owning outright their dwelling.

Immigration Impact On Population

Australia's immigration intake over the past 5 years has helped produce some population growth despite the overall

reduction in Australia's fertility rate, which would have produced an actual decline in the population. Australian-born respondents accounted for 71.8 per cent of all people, down from 73.9 per cent in 1996. Overseas born respondents have grown 2 per cent. After the Howard government took office in 1996, a change in immigration policy from an emphasis on population growth and family reunification to an emphasis on skills and economic-based immigration, reduced somewhat the impact of immigration on population growth.

Changes In Census Figures On Religious Affiliation:

Although declining, Christianity remains the dominant faith in Australia. The number of people declaring themselves Christian fell to 68 per cent, 2 per cent lower than in 1996. Buddhism accounted for 1.9 per cent of the population and Islam for 1.5 per cent, both having increased from 1.1 per cent of the population in 1996. The Muslim population in Australia has increased by approximately 85,000 since 1996. One quarter of the respondents indicated that they had no religion or did not answer the question.

Australia's Indigenous Population Grows:

An interesting footnote to the census results was an apparent disproportionate increase in the number of indigenous peoples reported. According to census figures, the indigenous population increased at a rate more than 2 and one half times greater than the increase in the general population. Indigenous-identified people in Australia now number 410,003 or 2.2 per cent of the population, up from 352,970 in 1996. Academics and commentators could not agree on the reason for this increase in people identifying themselves as indigenous in the 2001 census. Some academics have attributed the growth to mixed-race people being more willing to identify themselves as indigenous as a result of less social stigma being attached to indigenous Australians. Others have said that

there has been a genuine increase in birth rates among Australia's indigenous peoples.

More Educated And More Wired:
Almost six million Australians have now finished their High school degrees, while enrollments in universities and vocation/technical colleges (called TAFE) have boomed in the past five years. Women have benefited slightly more than men in the rise in educational level attainment,

and there has been a sharp growth in the numbers of young women attending university and especially TAFE. The census shows that 399,000 women attended university up from 342,000 in 1996. There are now 324,000 males at university, 34,000 more than the last census.

The 2001 census produced the first data on computer use and confirmed the country's high-tech reputation. The census found that 48.6 per cent of

Australian households had used a computer at home the week the census was taken. More than a third of the population (36 percent) had used the Internet.

Further information can be obtained from:

Justin McEvoy, Labor Specialist
American Embassy, Canberra
McEvoyJP@state.gov
or via CS Australia's office email at:
sydney.office.box@mail.doc.gov

Before we go... more on Defence...

Australia to Join Joint Strike Fighter Program

Australia's Defense Minister Robert Hill announced on June 27 2002, that Australia will join the Joint Strike Fighter (JSF) System Development and Demonstration Phase as a Level Three partner. Australia will contribute US\$150 million, allowing it privileged insight into, and contribution towards, the aircraft's development and early awareness of its ability to meet Australian cost, schedule and capability requirements.

According to the Minister's sources, if Australia chooses to acquire the JSF, over US\$300 million in net direct financial benefits could be available to the Australian Defense Department. Savings will accrue from a waiver of Foreign Military Sales charges, reduction in Non-Recurring Costs and royalties from future sales of JSF to non-SDD partner nations. Australia needs a new high-performance aircraft to provide the basis for the maintenance of a critical air-combat edge well into the 21st century.

Up to 100 new aircraft will replace Australia's F/A-18 Hornets and F-111 strike aircraft beginning in 2012. The AIR 6000 project considered project requirements, and evaluated a number of competing aircraft types, following which the Australian Government has decided that the United States' JSF is the most likely aircraft to satisfy Australia's needs. The JSF performance specification is suited to Australia's operational requirements, and operating a common aircraft type will enhance interoperability with the U.S.

Over the next several months, the Australian Department of Defense will negotiate the terms of Australia's involvement in this phase of the project, after which Australia will join the United Kingdom, the Netherlands, Denmark, Canada, Italy and Norway as participants in the SDD.

Defense Industry Specialist, Phil Keeling will continue to monitor developments in the aftermath of this landmark decision.
Phil.Keeling@mail.doc.gov

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Tel: 64-4-462-6002 Fax: 64-4-473-0770





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- access online to **a complete spectrum of matchmaking and commercial solutions**, from initial information to final delivery
- **trade professionals located in your country** who are only a phone call away, whenever you have a question or a problem
- **data security**
- confidence in using an **official U.S. Government web site**, and...



SUBSCRIPTION IS FREE!

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<http://www.BuyUSA.com>

